



BUDGET DOCUMENT CHECKLIST FOR MUNICIPAL CORPORATIONS

Instructions: Use this checklist to see if your budget is complete.

- 1) Use one checklist per budget document.
- 2) Inventory and check the items listed below that must be contained in your budget document.
- 3) Check the appropriate distribution point for each of the copies of your budget document.
- 4) Attach a checklist to the front of each budget document.
- 5) Complete the "Change of Address" section, if applicable.

Name of District _____

Inventory of Items in Budget Document:

- ☒ The budget calendar.
- ☒ The budget message.
- ☒ The newspaper clipping of the Notice of the First Budget Committee Meeting showing the date published; or an affidavit of publication, accompanying a copy of the actual publication.
- ☒ The newspaper clipping of the Notice of Budget Hearing and the Financial Summary showing the date published; or an affidavit of publication, accompanying a copy of the actual publication; or an affidavit of posting or mailing and a copy of the summary that was posted or mailed.
- ☒ The newspaper clipping of the Second Notice of the Budget Hearing showing the date published; or an affidavit of publication, accompanying a copy of the actual publication.
- ☐ All the budget detail sheets.
- ☒ The three resolution statements that adopt the budget, make appropriations, and levy taxes.
- ☒ The certification form (LB-50).
- ☐ Form LB-54 School District Safety Net Calculation, for use by school districts to levy outside their tax base.
- ☐ Sample ballots of all new tax bases and levies outside the tax base approved by the voters. (Bond election measures are not required to be submitted.)

Distribution of Budget Documents:

- ☒ 2 copies to county assessor of primary county if district is levying a tax.
- ☐ 1 copy to county assessor of joint counties if district is levying a tax in more than one county.
- ☒ 1 copy to county clerk.
- ☐ 1 copy to county treasurer if treasurer makes bond payments.
- ☐ 1 copy to Tax Supervising & Conservation Commission if district is in Multnomah County.
- ☐ 1 copy to Education Service District if a school district.
- ☐ 1 copy to Department of Education if a school district.
- ☐ 1 copy to Department of Revenue if district is not levying a tax.

CHANGE OF ADDRESS

Name of Municipal Corporation		Date Change Becomes Effective	
New Street Address			
City	State	ZIP Code	County
Name of Contact Person		Title	Date Released